


<b>AMENDMENT OF SOLICITATION/MODIFICATION OF CONTRACT</b>		1. CONTRACT ID CODE		PAGE OF PAGES 1 3	
2. AMENDMENT/MODIFICATION NO. 000002		3. EFFECTIVE DATE 06/23/2008		4. REQUISITION/PURCHASE REQ. NO.	
6. ISSUED BY U.S. Dept. of Homeland Security Office of Procurement Operations Dept. Operations Acquisition Div. 245 Murray Lane, SW Building 410 Washington DC 20528		CODE DHS/OPO/DEPT.OPS		5. PROJECT NO. (If applicable)	
		7. ADMINISTERED BY (If other than Item 6) U.S. Dept. of Homeland Security Office of Procurement Operations Dept. Operations Acquisition Div. 245 Murray Lane, SW Building 410 Washington DC 20528		CODE DHS/OPO/DEPT.OPS	
8. NAME AND ADDRESS OF CONTRACTOR (No., street, county, State and ZIP Code)		(x) 9A. AMENDMENT OF SOLICITATION NO. HSHQDC-08-R-00038			
		X 9B. DATED (SEE ITEM 11) 06/06/2008			
		10A. MODIFICATION OF CONTRACT/ORDER NO.			
		10B. DATED (SEE ITEM 11)			
CODE		FACILITY CODE			
<b>11. THIS ITEM ONLY APPLIES TO AMENDMENTS OF SOLICITATIONS</b>					
<input checked="" type="checkbox"/> The above numbered solicitation is amended as set forth in Item 14. The hour and date specified for receipt of Offers <input checked="" type="checkbox"/> is extended, <input type="checkbox"/> is not extended. Offers must acknowledge receipt of this amendment prior to the hour and date specified in the solicitation or as amended, by one of the following methods: (a) By completing Items 8 and 15, and returning _____ copies of the amendment; (b) By acknowledging receipt of this amendment on each copy of the offer submitted; or (c) By separate letter or telegram which includes a reference to the solicitation and amendment numbers. FAILURE OF YOUR ACKNOWLEDGEMENT TO BE RECEIVED AT THE PLACE DESIGNATED FOR THE RECEIPT OF OFFERS PRIOR TO THE HOUR AND DATE SPECIFIED MAY RESULT IN REJECTION OF YOUR OFFER. If by virtue of this amendment you desire to change an offer already submitted, such change may be made by telegram or letter, provided each telegram or letter makes reference to the solicitation and this amendment, and is received prior to the opening hour and date specified.					
12. ACCOUNTING AND APPROPRIATION DATA (If required)					
<b>13. THIS ITEM ONLY APPLIES TO MODIFICATION OF CONTRACTS/ORDERS. IT MODIFIES THE CONTRACT/ORDER NO. AS DESCRIBED IN ITEM 14.</b>					
CHECK ONE	A. THIS CHANGE ORDER IS ISSUED PURSUANT TO: (Specify authority) THE CHANGES SET FORTH IN ITEM 14 ARE MADE IN THE CONTRACT ORDER NO. IN ITEM 10A.				
	B. THE ABOVE NUMBERED CONTRACT/ORDER IS MODIFIED TO REFLECT THE ADMINISTRATIVE CHANGES (such as changes in paying office, appropriation date, etc.) SET FORTH IN ITEM 14, PURSUANT TO THE AUTHORITY OF FAR 43.103(b).				
	C. THIS SUPPLEMENTAL AGREEMENT IS ENTERED INTO PURSUANT TO AUTHORITY OF:				
	D. OTHER (Specify type of modification and authority)				
<b>E. IMPORTANT:</b> Contractor <input type="checkbox"/> is not, <input type="checkbox"/> is required to sign this document and return _____ copies to the issuing office.					
14. DESCRIPTION OF AMENDMENT/MODIFICATION (Organized by UCF section headings, including solicitation/contract subject matter where feasible.)					
The purpose of this amendment is to make changes to the Request for Proposal (RFP) posted on June 6, 2008 and amended on June 13, 2008, and to change the due date for Phase I proposals from June 26, 2008 to July 2, 2008. The time by which proposals must be delivered remains unchanged. Changes are as follows:					
(1) Delete Page 2 of the solicitation and replace with Change Page 2a.					
(2) Delete Page 3 of the solicitation and replace with Change Page 3a.					
(3) Delete Page 4 of the solicitation and replace with Change Page 4a.					
Continued ...					
Except as provided herein, all terms and conditions of the document referenced in Item 9A or 10A, as heretofore changed, remains unchanged and in full force and effect.					
15A. NAME AND TITLE OF SIGNER (Type or print)		16A. NAME AND TITLE OF CONTRACTING OFFICER (Type or print)			
		Harrison Smith			
15B. CONTRACTOR/OFFEROR		15C. DATE SIGNED		16B. UNITED STATES OF AMERICA	
(Signature of person authorized to sign)				 (Signature of Contracting Officer)	
				16C. DATE SIGNED 6/23/08	

## CONTINUATION SHEET

REFERENCE NO. OF DOCUMENT BEING CONTINUED  
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NAME OF OFFEROR OR CONTRACTOR

ITEM NO. (A)	SUPPLIES/SERVICES (B)	QUANTITY (C)	UNIT (D)	UNIT PRICE (E)	AMOUNT (F)
	(4) Delete Page 49 of the solicitation and replace with Change Page 49a.				
	(5) Delete Page 58 of the solicitation and replace with Change Page 58a.				
	(6) Delete Page 59 of the solicitation and replace with Change Pages 59a and 59b.				
	(7) Delete Page 62 of the solicitation and replace with Change Page 62a.				
	(8) Delete Page 63 of the solicitation and replace with Change Page 63a.				
	(9) Delete Page 64 of the solicitation and replace with Change Pages 64a and 64b.				
	(10) Delete Page 65 of the solicitation and replace with Change Page 65a.				
	(11) Delete Page 67 of the solicitation and replace with Change Pages 67a and 67b.				
	(12) Delete Page 69 of the solicitation and replace with Change Page 69a.				
	(13) Delete Page 70 of the solicitation and replace with Change Page 70a.				
	(14) Delete Page 72 of the solicitation and replace with Change Page 72a.				
	(15) Delete Page 73 of the solicitation and replace with Change Page 73a.				
	(16) Delete Page 73 of the solicitation and replace with Change Page 73a.				
	(17) Delete Page 74 of the solicitation and replace with Change Page 74a.				
	(18) Delete Page 75 of the solicitation and replace with Change Pages 75a and 75b.				
	(19) Delete Page 86 of the solicitation and replace with Change Page 86a.				
	(20) Delete Page 87 of the solicitation and replace with Change Page 87a. Continued ...				

## CONTINUATION SHEET

REFERENCE NO. OF DOCUMENT BEING CONTINUED

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NAME OF OFFEROR OR CONTRACTOR

ITEM NO. (A)	SUPPLIES/SERVICES (B)	QUANTITY (C)	UNIT (D)	UNIT PRICE (E)	AMOUNT (F)
	<p>(21) Delete Page 91 of the solicitation and replace with Change Page 91a.</p> <p>(22) Delete Page 106 of the solicitation and replace with Change Page 06a.</p> <p>(23) Delete Page 107 of the solicitation and replace with Change Page 107a.</p> <p>(24) Delete Page 108 of the solicitation and replace with Change Page 108a.</p> <p>(25) Delete Page 109 of the solicitation and replace with Change Page 109a.</p> <p>(26) Delete Page 110 of the solicitation and replace with Change Page 110a.</p> <p>(27) Delete Page 111 of the solicitation and replace with Change Page 111a.</p> <p>(28) Add Attachment J-13, Full Northern American Industry Classification System (NAICS) Codes and Descriptions.</p> <p>Note: These pages have been re-numbered using the "a" and "b" designations in order to keep the original page numbers for the remainder of the RFP.</p> <p>All other terms and conditions remain in full force and effect.</p>				

## **SECTION B - SUPPLIES OR SERVICES AND PRICES/COSTS**

### **B.1 General**

The resulting contract from this solicitation is titled Program Management, Administrative, Clerical, and Technical Services or PACTS and is available for use by all offices of the U.S. Department of Homeland Security (DHS). In support of Executive Order 13360, PACTS will be a Service Disabled Veteran Owned Small Business (SDVOSB) set-aside.

The Contractor shall provide, in accordance with issued task orders (TOs), all management, supervision, labor, facilities, and materials necessary to perform PACTS support services on an Indefinite Delivery Indefinite Quantity (IDIQ) basis. TOs may be Firm Fixed Price (FFP) and its various forms as indicated in Federal Acquisition Regulation (FAR) Part 16.2, Fixed-Price Contracts; Time and Material (T&M); or Labor Hour (LH) as defined in FAR Part 16. TOs will be issued in accordance with the procedures set forth in Section G of this contract.

### **B.2 Base and Option Periods**

The term of this IDIQ contract is a two (2) year base period and three (3) option periods with a period of performance of one (1) year each. This is not a multi-year contract as defined in FAR Part 17.1. TOs will be issued with specific performance periods.

### **B.3 Contract Pricing**

#### **B.3.1 Time and Material/Labor Hour/Firm Fixed Price Rates**

All task orders issued for services to be performed within the United States will be priced in accordance with the hourly rates set forth in Section B.4, Labor Category Rate Table. The labor rates in this section reflect the fully-burdened rates for each labor category and will apply to all direct labor hours. The labor categories, hourly rates, and indirect administrative cost rates are detailed in Section B.4 Labor Category Rate Table. The fully burdened hourly rates are ceiling price rates and the Contractor may, at its discretion, elect to propose lower hourly rates for individual task orders.

(a) Labor. Section B.4 Labor Category Rate Table represents fully-burdened hourly rates for each labor category. The fully-burdened labor rates include all direct, indirect, general and administrative costs and profit associated with providing the required skill. The fully-burdened labor rates include all labor and labor-related costs, such as, but not limited to, the following list of representative labor-related costs: salaries, wages, bonuses to include stock bonuses, incentive awards, employee stock options, stock appreciation rights, employee stock ownership plans, employee insurance, fringe benefits, contributions to pension, other post-retirement benefits, annuity, employee incentive compensation plans, incentive pay, shift differentials (if applicable), overtime (for applicable wage determination labor categories), vacation time, sick pay, holidays, and all other allowances based upon a comprehensive employee compensation plan. If overtime is required for Wage Determination applicable labor categories at the TO level, overtime will be compensated in accordance with the Service Contract Act. The use of uncompensated overtime is not encouraged. All hourly rates are based on a 40-hour work-week (ex. 1,920 hours per year or in accordance with the Contractor's accounting practices).

(1) Government Site Rates. When performing at Government sites within the United States, the Contractor shall provide services at or below the fully-burdened labor rates

indicated in Section B.4 Labor Category Rate Table. The Government will provide office space, furniture, and office equipment and supplies, as described in Section H.5, Government Property and as specified in the individual Task Orders.

(2) Contractor Site Rates. When performing at a Contractor site within the United States, the Contractor shall provide services at or below the fully-burdened labor rates included in Section B.4 Labor Category Rate Table which include loads for office space and all normal supplies and services required to support the work. This includes, but is not limited to, telephones, faxes, copiers, personal computers, postage (to include courier services such as Federal Express), ordinary business software (e.g., word processing, spreadsheets, graphics, etc.), normal copying and reproduction costs.

(b) Program Management (Contract-Level) Support Costs. Contract-level program management support costs shall not be billed as a direct charge to the PACTS base contract or task orders. Program management support costs encompass support for contract-level management, reporting requirements (see Section F) and related travel and meeting attendance costs associated with the Contractor's program management staff, as it relates to the overall management of the PACTS program.

(c) Project Management (Task Order-Level) Support Costs. Contract-level program management support costs are differentiated from individual task order project management support costs. TO Project Management support costs may be billed as hourly labor rates against individual task orders for direct support of the effort performed under those task orders. This will result in direct billings at the task order-level for labor hours in the "Project Manager" category, to specifically support program or project management for the task order.

(d) ODCs. ODCs consist of materials, subcontractor (other than labor) and task order-related travel costs, i.e., relocation and temporary duty (TDY) to include travel, lodging and meals. These percentages are indicated in the Section B.4 Labor Category Rate Table under the ODC rates. T&M and LH type TOs will include hours at the proposed rates herein for each skill category, plus materials (ODCs) and the indirect rate burden/allocation (i.e. percentages applied to travel, materials or subcontracts). The cost of general-purpose items required for the conduct of the Contractor's normal business operations will not be considered an allowable ODC in the performance of task orders under this contract. Profit is not allowed on ODCs under a T&M or LH type task order.

#### **B.3.1.1 Firm Fixed Price (FFP) Type Task Orders**

For FFP type task orders, the quantity of each item or labor category ordered will be multiplied against the rate negotiated at the contract level, or as negotiated for the TO, and the cumulative extended total of all items ordered will define the fixed price for the TO. Travel and ODCs, if applicable, may be estimated for each TO, burdened with the indirect administrative cost rates negotiated at the contract level, or as negotiated for the TO. Any total rate negotiated for travel and ODCs will be added to the extended price of all ordered items to arrive at the total fixed price for the TO. Partial payment of FFP type TOs may be negotiated based on the completion of milestones.

#### **B.3.1.2 Time and Material (T&M) and Labor Hour (LH) Type Task Orders**

For T&M and LH type TOs, the quantity of hours ordered from each labor category will be specified as deliverable hours billable at the ceiling rates specified in Section B.4 Labor Category Rate Table or as negotiated, if lower rates are proposed for the TO. If applicable,

travel and ODCs will be estimated for each TO and burdened with the indirect administrative cost rates specified in Section B.4 Labor Category Rate Table. Profit on travel and ODCs is not allowable. The cumulative extended total of all labor categories ordered plus travel and ODCs will define the TO ceiling price. TOs may authorize adjustments between labor category quantities of up to 10%, within the established task order ceiling price, without a formal modification. The Government will not reimburse the Contractor for costs incurred beyond the ceiling price, for hours not delivered, for hours delivered but in excess of the quantities ordered for a particular labor category or for travel and ODCs exceeding the ordered amount. Labor dollars will not be used to pay for ODCs nor ODC dollars used to pay for labor without a contract modification.

### **B.3.2 Work Outside the Continental United States (OCONUS)**

It is anticipated that there may be TOs under this contract for work outside the continental United States. There may be situations at the task order-level where the rates in Section B.4 may not be appropriate for OCONUS work. These situations will be determined by the Task Order Contracting Officer, PACTS Program Manager, and PACTS Contracting Officer. In order to determine OCONUS labor rates, in Phase II of this solicitation Offerors shall submit an OCONUS multiplier that will be applied at the TO level as necessary to a negotiated unburdened hourly rate to arrive at the fully burdened OCONUS rate for that TO. The multiplier proposed will be considered a ceiling, and may be applicable to OCONUS Task Orders as determined by the Task Order Contracting Officer, PACTS Program manager, and PACTS Contracting Officer. The multiplier must include indirect costs applicable to labor, and profit or fee, if any. The multiplier applies to all subcontracts and must not include or be applied to costs covered as other direct costs. The OCONUS multiplier shall not include any allowances as defined by the U.S. Department of State, which will be categorized as other direct costs.

The multiplier under this contract is: (to be completed at time of award)

Base Period:  
Option Period 1:  
Option Period 2:  
Option Period 3:

**Note:** If a task order is written in the Base Period with a period of performance that extends into Option Period 1, the applicable multiplier for work performed in the Base Period and Option Period One must be used (if the Contractor has proposed different multipliers for each year) in the task order. The same is applicable for future years. Non-funded extensions that will cause existing task orders to extend into a subsequent multiplier period would not typically involve a change in the allowable multiplier under that task order; funded extensions that add new work to the task order would normally allow the subsequent year's multiplier to apply. Under these circumstances, all changes in the allowable multiplier are subject to the Task Order Contracting Officer's discretion.

### **B.4 Labor Category Rate Table**

The Labor Category Rate Table represents all labor rates, ODCs and indirect burden for performance of the requirements as specified in individual Task Orders for performance within the United States. Fully loaded hourly labor rates are included for each labor category both at the Contractor site and at Government sites. These fully-loaded hourly labor rates are the ceiling rates representing the maximum rates allowable for Prime and Subcontractors. The years cited represent contract years. Only Government-required labor categories are included

## **SECTION J – LIST OF ATTACHMENTS**

- J-1 Sample Monthly Contract Status Report (Ref: Section F.10)
- J-2 Sample Subcontracting Report (Ref: Section F.12)
- J-3 Non-Disclosure Agreement, DHS Form 11000-6 (Ref: Section H.21)
- J-4 Pricing Templates (Ref: Section L.2 and L.11.2, Volume 2, Tab C)
- J-5 Program Manager Resume Format (Ref: Section L.10, Tab B)
- J-6 Relevant Experience Form (Ref: Section L.10, Tab C)
- J-7 Past Performance Statement Form (Ref: Section L.11.1 Volume 1, Tab F)
- J-8 Past Performance Questionnaire (Ref: Section L.11.1 Volume 1, Tab F)
- J-9 Staffing Level Profile Form (Ref: Section L.11.1 Volume 1, Tab H)
- J-10 Labor Category Table (Ref: Section L.11.1 Volume 1, Tab H)
- J-11 Quality Recognition and Certification Form (Ref: Section L.11.1 Volume 1, Tab F)
- J-12 Proposal Preparation Checklist (Ref: Section L.11.2 Volume II, Tab E)
- J-13 DHS Official Seal Usage Approval (Ref: Section D. 2)
- J-14 Full Northern American Industry Classification System (NAICS) Codes and Descriptions

**(End of Section J)**

### **L.3 Type of Contract (FAR 52.216-1) (APR 1984)**

The Government contemplates award of multiple IDIQ contracts resulting from this solicitation. The contracts will utilize Labor Hour, Time and Materials, and various Firm-Fixed Price contract types.

### **L.4 Service of Protest (FAR 52.233-2) (SEP 2006)**

(a) Protests, as defined in section 33.101 of the Federal Acquisition Regulation, that are filed directly with an agency, and copies of any protests that are filed with the Government Accountability Office (GAO), shall be served on the Contracting Officer (addressed as follows) by obtaining written and dated acknowledgment of receipt from:

Harrison Smith  
Contracting Officer  
U.S. Department of Homeland Security  
Office of Procurement Operations  
245 Murray Lane, Bldg 410  
Washington, DC 20528

(b) The copy of any protest shall be received in the office designated above within one day of filing a protest with the GAO.

### **L.5 Proposal Schedule**

All Phase I submissions are due NO LATER THAN 4:00PM, Washington, D.C. local time on July 2, 2008. Phase I proposals received after the date and time specified for receipt will not be considered by the Government, at the sole discretion of the Contracting Officer.

Only those Offerors that have been determined to be the most highly rated as a result of the Phase I evaluation will be invited to submit a proposal under Phase II. The Offerors eligible for Phase II will be notified of the Phase II proposal due date upon completion of the Phase I evaluation by the Government. It is anticipated that the Phase II submission due date will be approximately thirty (30) calendar days after eligible Offerors have been notified. Offerors not eligible to submit a proposal under Phase II will also be notified.

(CAUTION: See the proposal submission instructions at L.5.2, including the provision describing treatment of late submissions, notifications and withdrawals of proposals at FAR Clause 52.215-1 Instructions to Offerors — Competitive Acquisition).

#### **L.5.1 Communications and Questions**

Communications and questions concerning this solicitation or requests for clarification shall be made in writing to the Contracting Officer.

The due date for communications and questions concerning Phase I of the RFP is June 13, 2008.

As soon as an Offeror is aware of any problems or ambiguities in interpreting the specifications, terms or conditions, instructions or evaluation criteria of this solicitation, the Contracting Officer shall be notified.



Electronic submission of questions and comments shall be submitted via the PACTS mailbox at [PACTS@DHS.GOV](mailto:PACTS@DHS.GOV). Electronic mail attachments, if included, shall be prepared using Microsoft Office. Note that proposal submissions shall not be accepted electronically.

When submitting questions and comments, please refer to the specific text of the RFP in the following format:

**Subject: RFP No. HSHQDC-08-R-00038**  
**Reference: RFP Section \_\_, Paragraph(s) \_\_, Page(s) \_\_.**

Pertinent questions will be answered via amendment and provided to all Offerors on the Internet at [www.fbo.gov](http://www.fbo.gov). DHS will not attribute the questions to the submitting Offerors, but the text of the questions and answers may be available to the general public.

#### **L.5.2 Submission Instructions**

For both Phase I and Phase II, the proposal shall be delivered in a box to the following address:

U.S. Department of Homeland Security  
Attn: Harrison Smith, C/O Edwin Burton; Site Supervisor  
245 Murray Lane  
Bldg 410  
Washington, D.C. 20528

No deliveries will be accepted at any other DHS location and no electronic submissions will be accepted.

The outer wrapping of each box of the offer shall cite the information shown below. Failure to properly address the outer wrapping correctly may cause an offer to be misdirected.

- (a) Offeror's name and return address
- (b) U.S. Department of Homeland Security  
Attn: Harrison Smith C/O Edwin Burton; Site Supervisor  
245 Murray Lane  
Bldg 410  
Washington, D.C. 20528
- (c) DHS Solicitation Number: HSHQDC-08-R-00038 / PACTS

If the Offeror elects to forward the offer by means other than U.S. mail, it assumes the full responsibility of ensuring that the offer is received at the place and by the date and time specified in this solicitation. Such proposals must be closed and sealed in a box as if for U.S. Postal mailing, and must also be marked as set forth above. If hand-delivering proposals, Offerors should note that 245 Murray Lane is located on Bolling Air Force Base, Washington, DC. Offerors shall call the site Supervisor, Edwin Burton, at (202) 610-6793 (office) or (202) 309-8415 (cell) before going to Bolling Air Force Base in order to gain access through the gate. A Government-issued photo ID as well as proof of car insurance will be required to access the base. After passing through the first gate, Offerors shall wait at a second gate for Government personnel to receive proposals. Offerors will not pass through the second gate.

#### **L.6 Solicitation Copies and Enclosures**

An electronic copy of the solicitation and related documents will be available via the Internet at: [www.fbo.gov](http://www.fbo.gov). It shall be the responsibility of the firm to reproduce additional copies for its use.

Offerors shall note that proposals will be submitted in two (2) phases. In Phase I, the Government will evaluate the Offerors' Program Manager Qualifications and Experience. Only those Offerors that are determined to be the most highly rated as a result of Phase I will be eligible for Phase II. It is anticipated that the Phase II submission due date will be approximately thirty (30) calendar days after eligible Offerors have been notified. Offerors not eligible to submit a proposal under Phase II will also be notified. In Phase II, the Government will evaluate the Offerors' Program Management and Quality Control; Past Performance; Ability to Provide Effective Solutions; Ability to Recruit, Train, and Retain High Quality Personnel; and Price.

#### **L.9.1 Proposal Integrity**

In responding to this RFP, it is the Offeror's responsibility to provide current, complete and accurate information in their proposal. If in reviewing the proposal the Government identifies or otherwise learns that the provided proposal information is not accurate or misrepresents the Offeror's status or capabilities, that information may be used by the Contracting Officer as part of the Offeror's responsibility determination and could result in the Offeror not being eligible for award.

#### **L.9.2 General Format Instructions**

For each phase, if applicable, offerors shall furnish the proposal as set forth in L.10 and L.11. Each volume shall be complete in itself in order that evaluation of one section may be accomplished independently of, and concurrently with, evaluation of another. For hard copies, the Offeror shall provide an Original and five (5) paper copies (six (6) total copies). Each copy shall be clearly marked with the name of the Offeror, the appropriate volume and/or section number, and as Original or the number of the copy (e.g., Copy 1, Copy 2, etc.).

For electronic versions, the Offeror shall provide three (3) electronic (CD) copies which are formatted using Microsoft Office 2000, or an earlier version. Each CD shall be clearly marked with the name of the Offeror, the appropriate volume and/or section number, and as the number of the copy (e.g., Copy 1, Copy 2, etc.). Individual file sizes shall not exceed 5 MB.

Paper size shall be 8 ½" by 11" white paper with printing on one side only. The font (typewritten or printed letters) shall be 11-point Arial. No reduction is permitted except for organization charts or other graphic illustrations. In those instances where reduction is allowable, Offerors shall ensure that the print is easily readable; no less than 8-point font on graphs and 10-point font on tables. Each page shall have adequate margins on each side (at least 1") of the page. Header/footer information (which does not include any information to be evaluated) may be included in the 1" margin space. Fold outs for complete spreadsheets and/or organization charts are permissible up to 11" by 17", with printing on only one (1) side, if secured within the volume. Large sheets (i.e., greater than 8 ½" by 11") shall count as two (2) pages. Offeror's proposals shall not exceed the page limitations. Pages that exceed the maximum page limitation will not be evaluated. A Table of Contents, if included, will not be evaluated and will not be included as part of the page count.

In the event of a conflict between the contents of the hard copy version of the proposal and the contents of the electronic version, the hard copy version shall prevail. In the cover letter, the Offeror shall provide a certification that the hard copy version of the proposal is exactly the same as the electronic version.

Failure to comply with the formatting instructions in any way may result in a Contracting Officer determination that the proposal will not be evaluated. This determination will be made at the sole discretion of the Contracting Officer and in accordance with the instructions identified in L.9.2.

#### **L.10 Format and Instructions for Proposal Submission – Phase I**

Offerors' Phase I submittals shall consist of one (1) volume with three (3) Tabs. The maximum number of pages for each proposal Tab is as set forth below. Any pages exceeding the maximum number of pages will not be evaluated by the Government.

Prime and Joint Venture Offerors submitting a proposal in response to this solicitation must meet the small business size standard for each proposed Functional Category (see Section L.8).

In order for the proposal to be evaluated strictly on the merit of the material submitted, NO PRICE INFORMATION IS TO BE INCLUDED IN THE PHASE I SUBMISSION.

##### **Tab A – Cover Letter (1 page) and Executive Summary (2 pages) – Phase I**

Tab A information shall be submitted once, regardless of the number of Functional Categories to which the Offeror is proposing.

A cover letter shall accompany the proposal to set forth any information that the Offeror wishes to bring to the attention of the Government. The cover letter shall also stipulate that the Offeror's proposal is predicated upon all the terms and conditions of this RFP. In addition, it must contain a statement that the Offeror's acceptance period is valid for at least 180 calendar days from the date of receipt by the Government and state that the hard copy version of the proposal is exactly the same as the electronic version.

The Executive Summary shall provide an overview of the Phase I submittal and is to be used by the Government as an aid in understanding the organization, content, and interrelationship of the proposal material. Information is to be presented at the summary level and should only include general information about the proposal and the Offeror's understanding of and capability to meet the requirements of the solicitation.

The Offeror shall also complete and provide for the proposal the Phase I section of Attachment J-12, *Proposal Preparation Checklist*. Attachment J-12 is not included in the page limits for Tab A.

##### **Tab B – Factor 1: Program Manager Qualifications (3 pages) – Phase I**

Tab B information shall be submitted once, regardless of the number of Functional Categories to which the Offeror is proposing.

The Offeror shall provide the resume of the proposed contract-level Program Manager (PM). The resume shall be provided using the format specified in Attachment J-5, *Program Manager Resume Format*. The labor category description for the contract-level PM is provided in Attachment J-10, *Labor Category Table*. If the proposed contract-level PM is not a current employee of the Offeror (prime or team member/subcontractor), the resume must include a

statement that the prospective employee has authorized his/her resume to be submitted, intends to accept employment if the Offeror is selected for award, and that the parties have discussed salary parameters. If the contract-level PM candidate becomes unavailable at any point during the evaluation process, the Offeror shall immediately notify the Contracting Officer in writing.

Note: If the Offeror is a Joint Venture, pursuant to 13 C.F.R. 125.15, the proposed contract-level Program Manager must be an employee of the SDVOSB component of the Joint Venture.

**Tab C – Factor 2: Experience (2 pages for Each Form, Minimum of 3 Forms, Maximum of 10 Forms (Excludes Teaming Agreements)) – Phase I**

Tab C information shall be submitted for each Functional Category to which the Offeror is proposing. Each section shall be clearly marked with the name and number of the Functional Category.

If the Offeror is proposing with a team and requests that DHS evaluate a team member's/subcontractor's experience under Factor 2: Experience, the response to Factor 2 must include teaming agreements duly executed by the parties of the Offeror's team. Letters of commitment are acceptable examples of teaming agreements, and are considered teaming agreements for the purpose of responses to this solicitation. If submitted, letters of commitment shall include, at a minimum: 1) signatures of the principals and/or owners of the respective parties; 2) statements on the division of tasks, relationship of the parties, and responsibilities of parties; and 3) statements on the handling of disputes. Letters of commitment must state that they are valid and in effect for a period of not less than five (5) years.

The teaming agreements shall be valid for a period of not less than five (5) years. Offerors must submit a statement in their proposal indicating an understanding that DHS will evaluate the data received from the team and if an award is made based upon this information, DHS will not allow substitutions of team members or the addition of new members except under extreme circumstances and if approved by the Contracting Officer.

Offerors shall provide experience information for active or complete "relevant/recent" contracts/task orders and subcontracts (including Federal, State, and local Government and commercial) directly related to each of the proposed Functional Categories. Experience information provided may be from either the prime or a team member/subcontractor. Recent is defined as within the last five (5) years from the date of release of this RFP. Relevant is defined as work similar in complexity and magnitude to the scope of work identified in the SOW. Offerors shall provide the information required in accordance with Attachment J-6, *Relevant Experience Form*. Use one (1) form per experience.

The desired number of years of experience, by Functional Category, for prime Offerors proposing with team members/subcontractors, without team members/subcontractors, or as a Joint Venture, is as follows:

Functional Category 2 (FC2) – Administrative Services and Functional Category 3 (FC3) – Clerical Services. Two (2) years of experience relevant/recent to the proposed Functional Category is desired for the prime or component of a Joint Venture, and an additional two (2) years of relevant/ recent experience is desired for each team member/subcontractor, if any.

Functional Category 1 (FC1) – Program Management Services and Functional Category 4 (FC4) – Technical Services. Three (3) years experience relevant/recent to the proposed Functional Category is desired for the prime or component of a Joint Venture, and an additional three (3) years of relevant/recent experience is desired for each team member/subcontractor, if any.

The desired number of experience forms for an Offeror without team members or subcontractors is three (3) for each proposed Functional Category. The maximum number of experience forms for an Offeror without team members or subcontractors is ten (10) for each proposed Functional Category.

The desired number of experience forms for an Offeror with team members or subcontractors is three (3) for the prime Offeror and one (1) from each team member or subcontractor for each proposed Functional Category. The maximum total number of experience forms is ten (10) for each proposed Functional Category.

The desired number of experience forms for a Joint Venture without team members or subcontractors is three (3) from at least one (1) of the components of the Joint Venture, and one (1) from each of the remaining components of the Joint Venture for each proposed Functional Category. The maximum number of experience forms for a Joint Venture without team members or subcontractors is ten (10) for each proposed Functional Category.

The desired number of experience forms for a Joint Venture with team members or subcontractors is three (3) from at least one (1) of the components of the Joint Venture, and one (1) from each of the remaining components of the Joint Venture, team member, or subcontractor for each proposed Functional Category. The maximum number of experience forms for a Joint Venture with team members or subcontractors is ten (10) for each proposed Functional Category.

#### **L.11 Format and Instructions for Proposal Submission – Phase II**

The most-highly rated Offerors from Phase I will be eligible for Phase II. The Offerors eligible for Phase II will be notified of the Phase II proposal due date upon completion of the Phase I evaluation by the Government. It is anticipated that the Phase II submission due date will be approximately thirty (30) calendar days after eligible Offerors have been notified. Offerors not eligible to submit a proposal under Phase II will also be notified.

Offeror's Phase II submittals shall consist of two (2) separate volumes with the maximum number of pages for each proposal Volume and Tab as listed below. The two (2) separate volumes are Volume II – Technical/Management Proposal and Volume III – Pricing.

Prime and Joint Venture Offerors submitting a proposal in response to this solicitation must meet the small business size standard for each proposed Functional Category (see Section L.8).

In order for the technical volume to be evaluated strictly on the merit of the material submitted, **NO PRICE INFORMATION IS TO BE INCLUDED IN VOLUME I.**

### **L.11.1 Volume II – Technical/Management Proposal**

#### **Tab D - Cover Letter (1 page) and Executive Summary (2 pages) – Phase II**

Tab D information shall be submitted once, regardless of the number of Functional Categories to which the Offeror is proposing.

A cover letter shall accompany the proposal to set forth any information that the Offeror wishes to bring to the attention of the Government. The cover letter shall also stipulate that the Offeror's proposal is predicated upon all the terms and conditions of this RFP. In addition, it must contain a statement that the Offeror's acceptance period is valid for at least 180 calendar days from the date of receipt by the Government and state that the hard copy version of the proposal is exactly the same as the electronic version.

The Executive Summary shall provide an overview of the Phase II submittal and is to be used as an aid in understanding the organization, content, and interrelationship of the proposal material. Information is to be presented at the summary level and should only include general

that are not issued at the organizational level, agency level, or above should not be included. **(Attachment J-11 is excluded from the page limitations)**

(4) The Offeror shall state the level of current or planned participation in the DHS E-Verify Program. E-Verify (formerly known as the Basic Pilot/Employment Eligibility Verification Program) is an Internet-based system operated by the Department of Homeland Security in partnership with the Social Security Administration that allows participating employers to electronically verify the employment eligibility of their newly hired employees.

E-Verify is free and is the best means available for determining employment eligibility of new hires and the validity of their Social Security Numbers. Participation in E-Verify is required by any vendor who is awarded a contract resultant to this solicitation.

**Tab F – Factor 4: Past Performance (5 pages per Past Performance Statement, Minimum of 3 Past Performance Statements, Maximum of 10) – Phase II**

Tab F information shall be submitted for each Functional Category to which the Offeror is proposing. Each section shall be clearly marked with the name and number of the Functional Category.

Offerors must provide, at a minimum, three (3) contract/task order and subcontract (including Federal, State, and local Government and commercial) summaries detailing the work performed on “recent/relevant” efforts selected from the list of experiences provided under Factor 2 for each Functional Category to which the Offeror is proposing. If an Offeror is providing more than the minimum number of three (3) statements, at least three (3) of the past performance statements must come from the prime or one (1) of the components of the Joint Venture. Recent is defined as within the last five (5) years of the date of release of this RFP. Relevant is defined as work similar in complexity and magnitude to the scope of work identified in the SOW.

(1) Using Attachment J-7, *Past Performance Statement*, the Offeror shall identify, for each proposed Functional Category, a minimum of three (3) up to a maximum of ten (10) recent and relevant Government and/or commercial efforts on which it and/or its team member/subcontractor has performed as the prime or subcontractor.

The past performance response shall include a description of how the Offeror’s past performance demonstrates a capability and capacity to deliver high quality service and solutions in a performance based environment within the proposed Functional Category. **Each statement is limited to five (5) pages.**

The response shall focus on the key requirements of the project, as well as the size, scope and complexity of the efforts, the relevance to the Functional Category (Attachment J-7, Part II), if applicable, the performance measures and service level metrics applied to specific program objectives, and the actual results achieved against those measures (Attachment J-7, Part III).

(2) The Offeror shall also be responsible for ensuring that each of the customer references receives, completes and return an Attachment J-8, *Past Performance Questionnaire*, to the Contracting Officer. The completed Questionnaire shall be submitted directly via email from the customer reference to [PACTS@DHS.GOV](mailto:PACTS@DHS.GOV) by the due date established for receipt of offers.



Failure to receive a questionnaire from a reference will result in the non-consideration of the reference. The "subject" line in the submission email shall clearly indicate: PACTS Past Performance Questionnaire Submission for Offeror XX and the message shall originate from the

total number of personnel at the end of the period. **(Attachment J-9 is excluded from the page limitations)**

(3) Using Attachment J-10, *Labor Category Table*, the Offeror shall describe the personnel qualifications and experience for each of its labor categories, including a mapping to the Government's labor categories and the associated education and experience. Legal size paper may be used for Attachment J-10. **(Attachment J-10 is excluded from the page limitations)**

#### **L.11.2 Volume III – Contract Business/Price Proposal – Phase II**

Volume II shall be submitted once, regardless of the number of Functional Categories to which the Offeror is proposing. It should be noted that Tab C of Volume II includes sections for all of the Functional Categories to which the Offeror is proposing, but it should be submitted only once with all applicable information within a single document/file.

#### **Tab I - Exceptions and Deviations – Phase II**

Each proposal shall include an exceptions/deviations section in Volume II that identifies and explains in detail any exceptions, deviations, or conditional assumptions taken with the requirements of the RFP. Any exception, etc., taken must contain sufficient amplification and justification to permit evaluation. All benefits to the Government shall be fully explained for each exception taken. Such exceptions will not, of themselves, automatically cause a proposal to be termed unacceptable. A large number of exceptions, or one or more significant exceptions not providing benefit to the Government, may, however, result in rejection of the proposal.

#### **Tab J – Contract Documents and Associated Information – Phase II**

The Offeror shall provide an SF-33, SF-30s (Amendments), and if applicable, supplementary information, such as:

- Cognizant DCAA office,
- Cognizant DCMA office,
- Information regarding facility clearances,
- Approved accounting systems, and
- Approved purchasing systems.

The Offeror's acceptance period shall not be less than that prescribed in Block 12 of the SF-33.

The Offeror shall include the Representations and Certifications, in accordance with Section K.

**NOTE: FOR K.2 Contractor shall provide applicable NAICS codes for the functional categories proposed.**

The Offeror shall also complete and provide for the proposal the Phase II section of Attachment J-12, *Proposal Preparation Checklist*.

#### **Tab K – Price Proposal – Phase II**

Using Attachment J-4, *Pricing Templates*, the Offeror shall provide its Price Proposal. The attachment is comprised of multiple worksheets, described as follows:

- (1) Attachment J-4, Part I, *Pricing Templates – B.4 Labor Category Rate Table*. The Offeror shall only submit the Indirect Administrative Costs rates and OCONUS multiplier. Upon contract award, Hourly Labor Rates from other worksheets will be inserted in Section B - Schedule.
- (2) Attachment J-4, Part II, *Pricing Templates - Hourly Labor Rates* provides the format for submitting hourly labor rates for the Government labor categories across all proposed Functional Categories. The Offeror will complete and submit the Hourly Labor Rate tables using their proposed labor category titles.
- (3) Attachment J-4, Part III, *Pricing Templates – Other Pricing Information*, is an outline for including an explanation of other factors to be considered along with proposed prices. The Offeror shall submit information other than cost or pricing data in support of the prices proposed, including:
  - The proposed cost breakdown structure (see Section L.2);
  - Identification of specific labor categories and the contracts for which fair and reasonable determinations have been made including the source contract and contact information for the cognizant Contracting Officer;
  - The multiplier and its methodology to be used for developing worldwide (OCONUS) rates (see Section B.3.2); and
  - Any other cost or price related information.

**Tab L – Financial Statements (No page limit – to be included only on CD copies of proposal) – Phase II**

The Contracting Officer will conduct a responsibility assessment of each Offeror being considered for award. The following information shall be submitted to assist the Contracting Officer in making a responsibility determination:

- (1) Sufficient information to demonstrate the financial capability to perform a contract of this size and duration. The Offeror shall provide information related to its current financial condition and the sources of all funds that will be used to finance contract performance. Indicate dollar amount, names and telephone numbers of banks and other sources of funds that may be contacted to verify the pertinent financial data. Audited financial statements are not required, but if an Offeror includes them in its proposal, the Government will consider them in its evaluation. Any interim financial statements such as quarterly reports, shall also be provided if the annual statements are more than six months old. Interim financial reports may be unaudited.
- (2) The Offeror shall submit a list of all commitments with the Government relating to the specified work or services that may interfere with the completion of the work or services contemplated under this contract or which may be impacted by performance of this work.
- (3) A description of all current or pending legal actions under Federal contracts within the past three (3) years from the date of release of this RFP. This shall include, but not be limited to, formal or informal requests for equitable adjustments or claims over \$5 million, pending or ongoing cure notices, and terminations for convenience or default.

## **SECTION M – EVALUATION FACTORS FOR AWARD**

### **M.1 General**

The Government is conducting this source selection in accordance with the competitive negotiation source selection procedures contained in FAR Part 15. The Government will conduct the evaluation of proposals in two (2) phases. In Phase I, the Government will evaluate the Offeror's Program Manager Qualifications and Experience. Those Offerors that are determined to be the most highly rated as a result of Phase I will be invited to submit Phase II proposals. In Phase II, the Government will evaluate the Offeror's Program Management and Quality Control; Past Performance; Ability to Provide Effective Solutions; Ability to Recruit, Train, and Retain High Quality Personnel; and Price. In making an award determination, the Government will consider an Offeror's entire proposal, which is defined as the combination of the Phase I and Phase II submissions.

In accordance with FAR 52.215-1(f), the Government intends to award multiple contracts with awards made to the responsible Offerors whose proposals represent the best value to the Government. Best value is defined in FAR Part 2 as the expected outcome of an acquisition that, in the Government's estimation, provides the greatest overall benefit in response to the requirement. The Government will conduct the best value analysis after the Phase II evaluation of proposals using all the factors listed in Section M.3. In performing its best value analysis, the Government will compare any relevant differences among the evaluated proposals to determine which proposal(s) offer(s) the overall best value. This effort will include comparing the strengths, weaknesses, and risks associated with each offer. As proposals approach equal ratings as a result of the technical evaluation, price will become more important in making the award determination. In the event that proposals are determined to not have any substantial technical differences (i.e. are technically equivalent), award(s) may be made to the lower priced Offeror(s). It should be noted that award may be made to other than the lowest priced Offeror(s) if the Government determines that a price premium is warranted due to technical merit. The Government may also award to other than the highest technically rated proposals, if the Government determines that a price premium is not warranted.

The Government does not intend to hold discussions. However, Government reserves the right to hold discussions in Phase II, at the sole discretion of the Contracting Officer. No discussions will be held in Phase I of this acquisition. Therefore, all proposal submissions should contain the Offerors' best terms from a technical and price standpoint.

The Government will evaluate all proposals in accordance with FAR 15.305(a), and, if discussions are to be conducted during Phase II, establish the competitive range. The Contracting Officer, at their sole discretion, will establish a competitive range comprised of all the most highly rated proposals, unless the range is further reduced for purposes of efficiency.

After evaluating all proposals in accordance with FAR 15.305(a), the Contracting Officer, at their sole discretion, may determine that the number of most highly rated proposal that might otherwise be included in the competitive range exceeds the number at which an efficient competition can be conducted. For the purposes of efficiency, the Contracting Officer, at their sole discretion, may limit the number of proposals in the competitive range to the greatest number that will permit an efficient competition among the most highly rated proposals.

When conducting the evaluation, the Government may use data included by Offerors in their proposals. The Government reserves the right to use data obtained from other sources while conducting its evaluation. Each Offeror is responsible for ensuring that the information provided is thorough, accurate, and complete.

## **M.2 Basis for Award**

The Government intends to award multiple contracts to the responsible Offerors whose proposals represent the best value to the Government, price and other factors considered. The source selection will be conducted at the Functional Category level (Functional Categories 1 - 4). A sufficient number of awards will be made under each Functional Category to ensure adequate competition at the TO level. Offerors proposing to multiple Functional Categories are advised that award may be made on one (1), all, or any combination of the Functional Categories to which the Offeror proposes.

## **M.3 Evaluation Factors**

The selection decision will be based on evaluation of the following factors:

### **(a) Non-Price Factors**

#### **Phase I**

Factor 1: Program Manager Qualifications

Factor 2: Experience

#### **Phase II**

Factor 3: Program Management and Quality Control

Factor 4: Past Performance

Factor 5: Ability to Provide Effective Solutions

Factor 6: Ability to Recruit, Train, and Retain High Quality Personnel

### **(b) Price Factor (non-rated)**

#### **Price**

Order of Importance: For Phase I, Factors 1 and 2 are in descending order of relative importance. For those most highly rated proposals that are selected for Phase II, Factors 1 and 2 are significantly more important than Factor 3. Factor 3 is more important than Factors 4, 5, and 6, which are of equal importance. When combined, all non-price factors are significantly more important than price. As proposals become more equal in terms of non-price factors, price becomes more important.

## **M.3.1 Evaluation Factors – Phase I**

The evaluation factors for Phase I are Factor 1: Program Manager Qualifications and Factor 2: Experience. The Government will evaluate Factors 1 and 2 to determine the most highly rated Offerors that will be eligible for Phase II.

### **M.3.1.1 Factor 1: Program Manager Qualifications**

The Government will evaluate the qualifications of the proposed contract-level Program Manager to determine the extent to which his/her experience is commensurate with the requirements of a contract of this type, size, scope, and complexity, and the extent which his/her

qualifications address the labor category description for the contract-level Program Manager described in *Attachment J-10, Labor Category Table*.

### **M.3.1.2 Factor 2: Experience**

The Government will evaluate the information submitted for active or complete “relevant/recent” contracts/task orders and subcontracts (including Federal, State, and local Government and commercial) directly related to the Functional Categories to which the Offeror is proposing. Recent is defined as within the last five (5) years from the release date of this RFP. Relevant is defined as work similar in complexity and magnitude to the scope of work identified in the SOW. This evaluation will focus on the size, scope and complexity of the efforts, the degree of relevance to the proposed Functional Category, and the extent to which the information submitted indicates a level of experience which meets or exceeds the minimum requirements for each Functional Category as set forth in L.10. If applicable, the evaluation will also address the extent to which the proposal includes teaming agreements duly executed by the parties of the Offeror's team for a period of not less than five (5) years. Letters of commitment are acceptable examples of teaming agreements.

### **M.3.2 Evaluation Factors – Phase II**

The evaluation factors for Phase II are Factor 3: Program Management and Quality Control; Factor 4: Past Performance; Factor 5: Ability to Provide Effective Solutions; Factor 6: Ability to Recruit, Train, and Retain High Quality Personnel; and Price.

#### **M.3.2.1 Factor 3: Program Management and Quality Control**

##### **(1) Program Management**

The Government will evaluate the proposed management structure and management solutions for the extent to which:

- The approach and methodologies to the planning, execution, tracking, and reporting of the TOs awarded under this contract demonstrate sound and logical business practices.
- The proposed Project Management approach and the Offeror's methodology for ensuring that cost, schedule and performance objectives (including service level agreements or other types of performance metrics and measures) are controlled, reported, and managed.
- The approach for managing multiple TOs demonstrates knowledge and application of project management disciplines.
- The Offeror's governance and reporting structure provides transparency and Government access to real time cost, schedule and performance metrics.

##### **(2) Quality Control**

The Government will evaluate the extent to which the proposed Quality Control process includes a comprehensive, verifiable, and self-implementing approach for monitoring its performance and handling corrective actions.

##### **(3) Certifications, Quality Recognition, and Awards**

The Government will evaluate the extent to which quality recognition, awards, and certifications received by the Offeror demonstrate the existence and application of high quality processes in

delivering solutions to its customers. Emphasis will be placed on quality awards and certifications that are current and directly relevant to the Functional Categories to which the Offeror is proposing. International and national level awards and certifications will be considered more highly than local and regional awards. In addition, the Government will examine the source of the award or certification, with self-assessment rankings receiving less credit than recognition/certifications received from an independent rating activity. Individual customer "letters of appreciation" and other forms of recognition that are not issued at the organizational level, agency level, or higher will not be considered.

#### (4) Participation in the E-Verify Program

The Government will evaluate the Offeror's management effectiveness with respect to participation in the E-Verify Program. The Offeror will be evaluated on the extent to which it demonstrates current, or recently initiated, enrollment and current, or planned, participation in the E-Verify Program. Current use of the E-Verify program will be considered under the Program Management and Quality Control factor.

#### **M.3.2.2 Factor 4: Past Performance**

The past performance evaluation will examine the extent to which the Offeror's past performance demonstrates their capability and capacity to deliver high quality service and solutions within the proposed Functional Category. In conducting the past performance assessment, the Government may use data obtained from other sources as well as that which is provided in the proposal.

The past performance evaluation for each Functional Category will examine the Offeror's performance on the efforts submitted (minimum of three (3), maximum of ten (10)). This evaluation will focus on the size, scope and complexity of the efforts, the degree of relevance to the Functional Category, the extent to which performance measures and service level metrics were applied to specific program objectives, and the actual results achieved against those measures. While not required, those Offerors able to identify service level metrics and performance measures may be evaluated favorably.

Lack of relevant past performance will result in assignment of a neutral past performance rating indicating neither a favorable nor unfavorable evaluation ranking.

#### **M.3.2.3 Factor 5: Ability to Provide Effective Solutions**

The Offerors' proposals will be evaluated on the soundness of their ability to provide effective and efficient solutions to meet requirements, and the ability to systematically identify the most current technologies, services, and techniques available in the marketplace.

If applicable, the Government will evaluate the approach and rationale for selecting the proposed team members/subcontractors, the value added by each team member/subcontractor, the rationale used for addressing the proposed Functional Categories, and the organizational logic and utility for working in effective partnership with DHS..

#### **M.3.2.4 Factor 6: Ability to Recruit, Train, and Retain High Quality Personnel**

The Government will evaluate the Offeror's ability to recruit, train, and retain high quality personnel. Emphasis will be placed on the education, professional certifications, and security credentials obtained by the work force in relation to the number of personnel in the business

unit, their average length of service, and the turnover rate experience of the business unit within three (3) years from the date of release of this RFP.



### ATTACHMENT J-6 – Relevant Experience Form

#### INSTRUCTIONS:

1. Indicate Offeror Name Submitting Form
2. Indicate if Offeror Submitting Form is the PACTS Prime Offeror, Team Member or Subcontractor
3. If Offeror Submitting Form is either Team Member or Subcontractor, Indicated Prime Offerors Name
4. Indicate the applicable functional category

Offeror Submitting Form: \_\_\_\_\_

Prime Offeror: \_\_\_\_\_ Joint Venture Component: \_\_\_\_\_ Subcontractor: \_\_\_\_\_

Prime Offeror's Name: \_\_\_\_\_

Functional Category:   1 – Program Management       \_\_\_  
                              2 – Administrative Services       \_\_\_  
                              3 – Clerical Support               \_\_\_  
                              4 – Technical Services           \_\_\_

Contract/Task Order Title: _____	
Contract Number: _____	
Project Name: _____	
Prime Contractor, Subcontractor or Joint Venture Component on the Contract/Task Order:	
If Prime Contractor, list Major Subcontractor(s), if applicable:	
Federal Agency or Commercial Organization:	
Contract/Task Order CO:	
Contract/Task Order COTR:	
Other Contract/Task Order Technical POC(s):	
COTR/CO Contact information to include: Name, Title, Phone No. and Address	
Contract/Task Order Period of Performance:	
Contract/Task Order Type (FFP, T&M, CPFF, etc.):	
Contract/Task Order Total Value:	

<b>Detailed Product(s)/ Service(s) Provided:</b>	
<b>Awards, Recognitions, and Certifications Received:</b>	
<b>Relevancy of Offeror's Experience and Efforts to PACTS Functional Category:</b>	

**Part III - PROGRAM SERVICE LEVEL AGREEMENTS – MEASURES and MONITORING**

<b>Offeror:</b>	
<b>Program, Project Or Task Title:</b>	

Provide the performance measures and service level metrics applied to specific program objectives, and the actual results achieved against those measures. The service level agreements or performance standards should be specific and show the target performance levels that are set forth under the applicable contracts. A summary of performance ratings shall be provided showing the performance results achieved by the prospective offeror for the latest two contract rating periods. The information may be provided in Landscape format.

For each SLA, provide the following information:

Program Objectives	Measures/ metrics	Acceptable level of performance	Monitoring/measuring methodology	Incentives/ disincentives	Actual measured results
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**Phase I Proposal** (check YES if proposal requirement is met and NO if proposal requirement is not met. Include location of explanation (i.e., specific proposal section), if proposal requirement is not met.

PROPOSAL REQUIREMENT	YES	NO	If NO, indicate proposal section with explanation
<b>TAB A (L.10)</b>			
Cover Letter (1 Page) indicating Terms and Conditions; Acceptance Period of 180 calendar days.			
Executive Summary (2 pages): Overview of proposal			
<b>TAB B (L.10)</b>			
Program Manager Qualifications - Resume of proposed Program Manager Attachment J-5, Program Manager Resume Format (3 pages)			
<b>TAB C (L.10)</b>			
Experience directly related to the PACTS requirements Attachment J-6, Relevant Experience Form (2 pages per form; minimum 3 forms, maximum 10 forms – Teaming Agreements / Letters of Commitment are excluded from page count))			

## PHASE II PROPOSAL

Offeror: \_\_\_\_\_

**DISCLAIMER:** This Checklist is to assist offerors in proposal development. The Government is not responsible for any omissions from this checklist. Offerors are fully responsible for the accuracy, completeness, and compliance with all proposal instructions.

**Functional Categories (check applicable boxes):**

FUNCTIONAL CATEGORY 1	FUNCTIONAL CATEGORY 2	FUNCTIONAL CATEGORY 3	FUNCTIONAL CATEGORY 4
Program Management	Administrative	Clerical	Technical Services

### Technical Proposal

Tabs D, E, G and H shall be completed once for the entire proposal.

Tabs F shall be completed for each individual Functional Category the Offeror elects to propose on and shall focus on the related criteria cited in Section M.

The Offeror shall organize its proposal to clearly distinguish the individual Functional Categories proposed.

**Volume II – Technical/Management Proposal (check YES if proposal requirement is met and NO if proposal requirement is not met. Include location of explanation (i.e., specific proposal section), if proposal requirement is not met.**

PROPOSAL REQUIREMENT	YES	NO	If NO, indicate proposal section with explanation
<b>TAB D (L.11.1)</b>			
Cover Letter (1 Page) indicating Terms and Conditions; Acceptance Period of 180 calendar days.			
Executive Summary (2 pages): Overview of proposal			
<b>TAB E (L.11.1)</b>			
(1) Program Management Approach (10 page limit including 2 page proposed Program Manager's resume)			
(2) Quality Control Process (2 page limit): QC description includes process, approach and procedures			
(3) Certifications, Quality Recognition, and Awards (Attachment J-11 excluded from page count)			
(4) e-Verify Statement (Excluded from page count)			
<b>TAB F (L.11.1)</b>			
Attachment J-7: Three (3) to ten (10) Past Performance Statements for each Functional Category (5 pages per Past Performance Statement)			
Attachment J-7 Part II, Program Description and Relevance			
Attachment J-7, Part III, Program Service Level Agreements-Measures and Monitoring			
Attachment J-8, Past Performance Questionnaire (to be sent directly from offeror's reference to PACTS@dhs.gov)			
<b>TAB G (L.11.1)</b>			
Description of ability provide effective solutions (5 page limit)			

PROPOSAL REQUIREMENT	YES	NO	If NO, indicate proposal section with explanation
TAB H (L.11.1)			
Description of processes, procedures and procedures demonstrating ability to recruit, train, and retain high-quality personnel (3 page limit)			
Attachment J-9, Staffing Levels Profile Form			
Attachment J-10, Labor Categories and Qualifications			

**Volume III – Contract Price Proposal (check YES if proposal requirement is met and NO if proposal requirement is not met. Include location of explanation (i.e., specific proposal section), if proposal requirement is not met.**

PROPOSAL REQUIREMENT	YES	NO	If NO, indicate proposal section with explanation
<b>TAB I (L.11.2)</b>			
Exceptions and Deviations: identifying any exceptions, deviations, or conditional assumptions taken with the requirements of the RFP.			
<b>TAB J (L.11.2)</b>			
Contract Documents and Associated Information: SF-33, SF-30s, Cognizant DCAA & DCMA offices, facility clearances, information, accounting system, purchasing system			
SF-33, Block 12 indication of acceptance period (if different)			
Section K - Representations and Certifications			
Attachment J-12: Proposal Preparation Checklist			
<b>TAB K (L.11.2)</b>			
Attachment J-4, Part I, Pricing Templates - B.4 Labor Category Rate Table			
Attachment J-4, Part II, Pricing Templates - Hourly Labor Rates for each Functional Category proposed			
Attachment J-4, Part III, Pricing Templates - Other Pricing Information narrative/explanation of proposed cost breakdown structure, other contracts' labor categories, pricing methodology or algorithm for worldwide rates, and other cost or price related information			
<b>TAB L (L.11.2)</b>			
Financial Statement (included on CD only): information demonstrating financial capability.			
Financial Statement (included on CD only): List of all commitments with the Government that may interfere with fulfilling the requirements of this RFP or may be impacted by performance of these			



PROPOSAL REQUIREMENT	YES	NO	If NO, indicate proposal section with explanation
requirements.			
Financial Statement (included on CD only): Description of all pending legal actions under Federal contracts within the past three years			

## **ATTACHMENT J-14 – FULL NAICS CODE DESCRIPTIONS**

NOTE: The below descriptions are taken directly from the U.S. Census Bureau's website ([www.census.gov](http://www.census.gov)) and are an inclusive list. There is no guarantee that a particular type or amount of the specific services listed under each NAICS code description will be ordered via a Task Order at a specific point in time.

### **Functional Category 1 – 541611: Administrative Management and General Management Consulting Services**

This U.S. industry comprises establishments primarily engaged in providing operating advices and assistance to businesses and other organizations on administrative management issues, such as financial planning and budgeting, equity and asset management, records management, office planning, strategy and organizational planning, site selection, new business startup, and business process improvement. This industry also includes establishments of general management consultants that provide a full range of administrative; human resources; marketing; process, physical distribution, and logistics; or other management consulting services to clients.

### **Functional Category 2 – 561110: Office Administrative Services**

This industry comprises establishments primarily engaged in providing a range of day-to-day office administrative services, such as financial planning; billing and recordkeeping; personnel; and physical distribution and logistics for others on a contract or fee basis. These establishments do not provide operating staff to carry out the complete operations of a business.

### **Functional Category 3 – 561410: Document Preparation Services**

This industry comprises establishments primarily engaged in one or more of the following: (1) letter or resume writing; (2) document editing or proofreading; (3) typing, word processing, or desktop publishing; and (4) stenography (except court reporting or stenotype recording), transcription, and other secretarial services.

#### **561421: Telephone Answering Services**

This U.S. industry comprises establishment primarily engaged in answering telephone calls and relaying messages to clients.

#### **561431: Private Mail Centers**

This U.S. industry comprises (1) establishments primarily engaged in providing mailbox rental and other postal and mailing (except direct mail advertising) services or (2) establishments engaged in providing these mailing services along with one or more other office support services, such as facsimile services, word processing services, on-site PC rental services, and office product sales.

#### **Functional Category 4 – Engineering Services**

This industry comprises establishments primarily engaged in applying physical laws and principles of engineering in the design, development, and utilization of machines, materials, instruments, structures, processes, and systems. The assignments undertaken by these establishments may involve any of the following activities: provision of advice, preparation of feasibility studies, preparation of preliminary and final plans and designs, provision of technical services during the construction or installation phase, inspection and evaluation of engineering project, and related services.